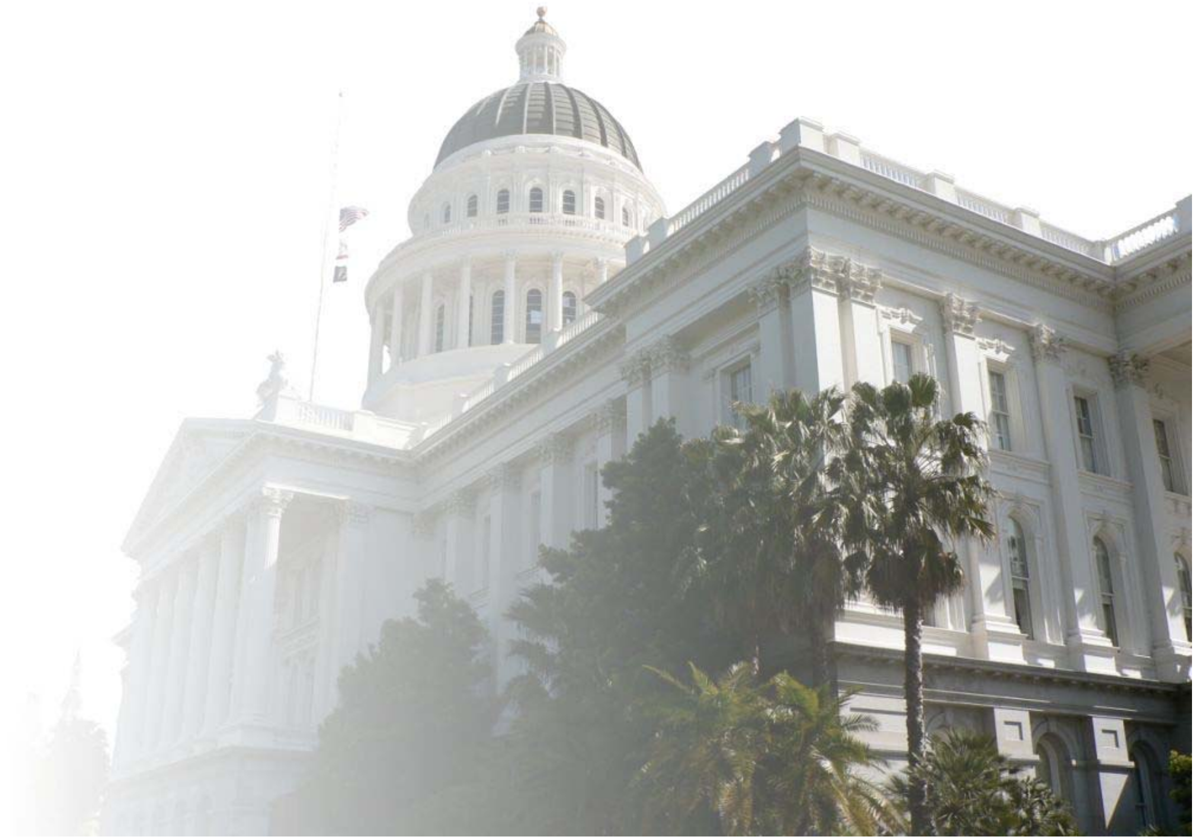
FI$Cal Forum



Financial Information System for California

Agenda

- Welcome & Introductions
- Project Status & Update
- Legacy Systems & Readiness
- Change Readiness Assessments
- Questions & Answers

Welcome!

- Housekeeping
- What's in your welcome package?
  - Agenda (**yellow**)
  - Question cards (**blue**)
  - Pen
- Post-Forum Survey

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Project Status & Update

Barbara Taylor

FI$Cal Project Executive

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Project Status

	MILESTONE ACTIVITIES
November 2009	SPR 3 Approved by Technology Agency (formerly OCIO)
April 2010	Request for Proposals (RFP) Released
June 2010	Stage 1 Contracts Awarded
April 2011	SPR 3 Addendum Approved by Technology Agency
May 2011	Fit Gap Completed
June 2011	Stage 2 Final Bids Received
January 2012	Evaluation and Selection Report Completed
February 2012	SPR 4 Approved by Technology Agency
February 2012	Legislative Report Developed and Submitted
March 2012	Notification of Intended Awardee Published
May 2012	Award Stage 2 Contract

Procurement Award

- Accenture was the highest scoring bidder.
- Implementation plan: Five waves spanning five years.

Department Wave Schedule

- Accenture costs of $213.1 M
- Total project costs of $617M

SPR2 vs. SPR4 Comparison

SPR 2	SPR 4
$1.6 Billion	$617 Million
- Project Staff – 499 Positions	- Project Staff – 304 Positions
- Program Staff – 243 Positions	- Program Staff – 0 Positions
- System Integrator Services	- System Integrator Services – ($173M) Reduction
- Data Center Services	- Data Center Services – ($282M) Reduction

*Two-stage procurement enabled bidders to reduce the “risk premium” usually associated with large IT projects. Additionally, the active competition among the three bidders resulted in lower proposed costs.

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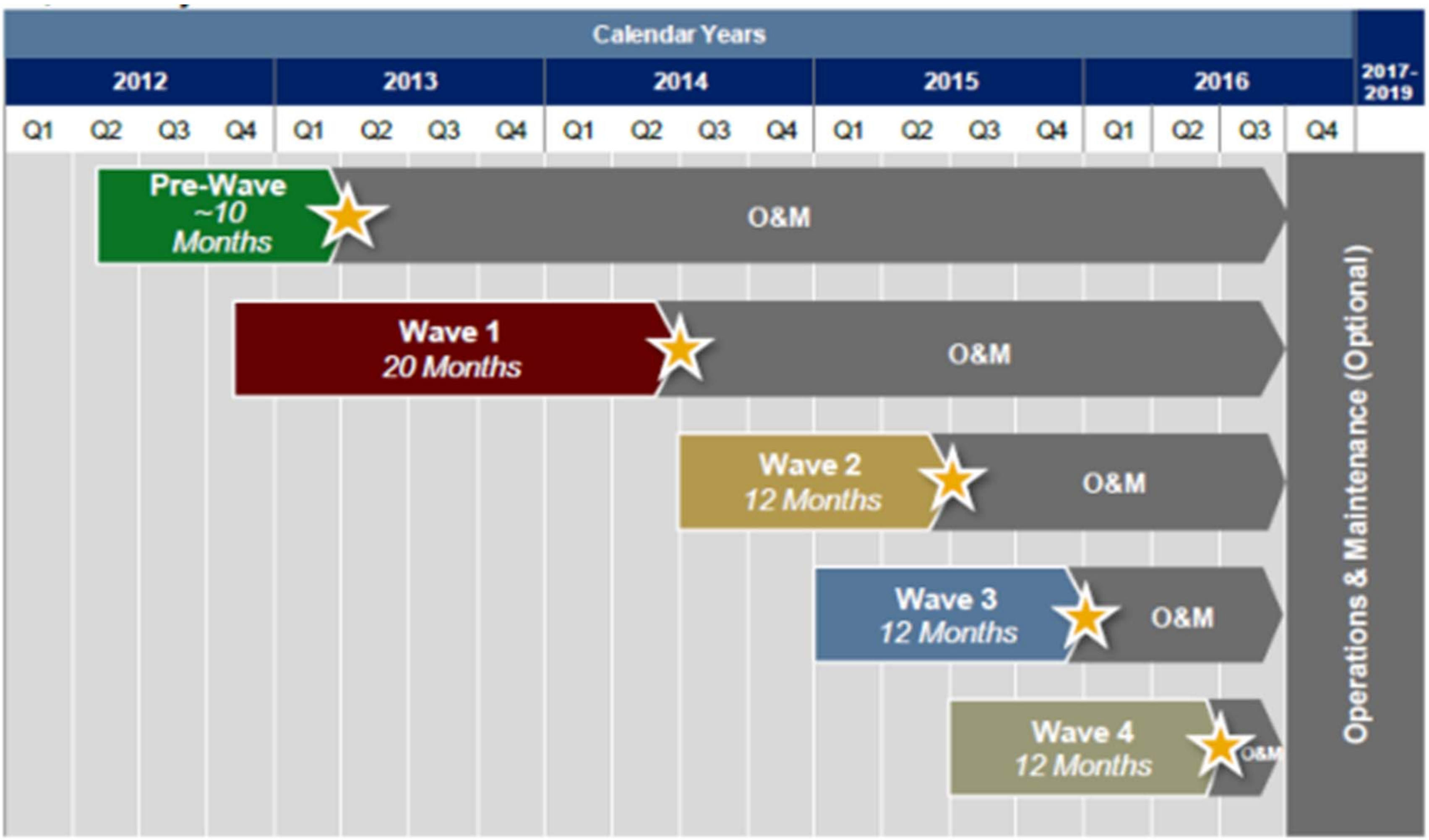
Implementation Plan



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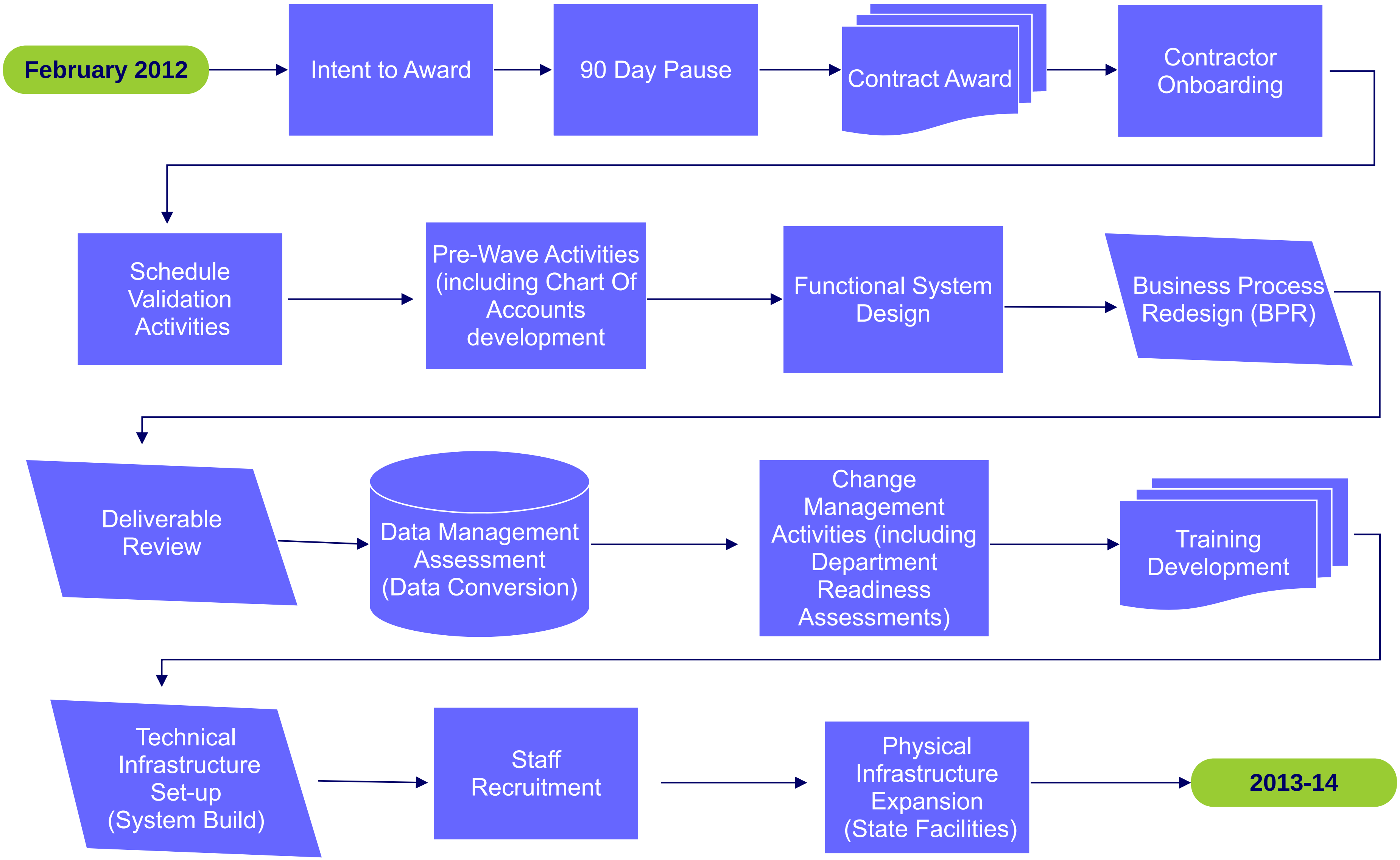
Project Activities for 2012-13



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Project Next Steps

Design
- Design future business processes

Configure
- Build and document the system, based upon design phase decisions

Testing
- Make sure that the system performs in the desired manner

Deployment
- Rollout the system to end-users and train staff to use the system

Support
- Maintain, operate and update the system

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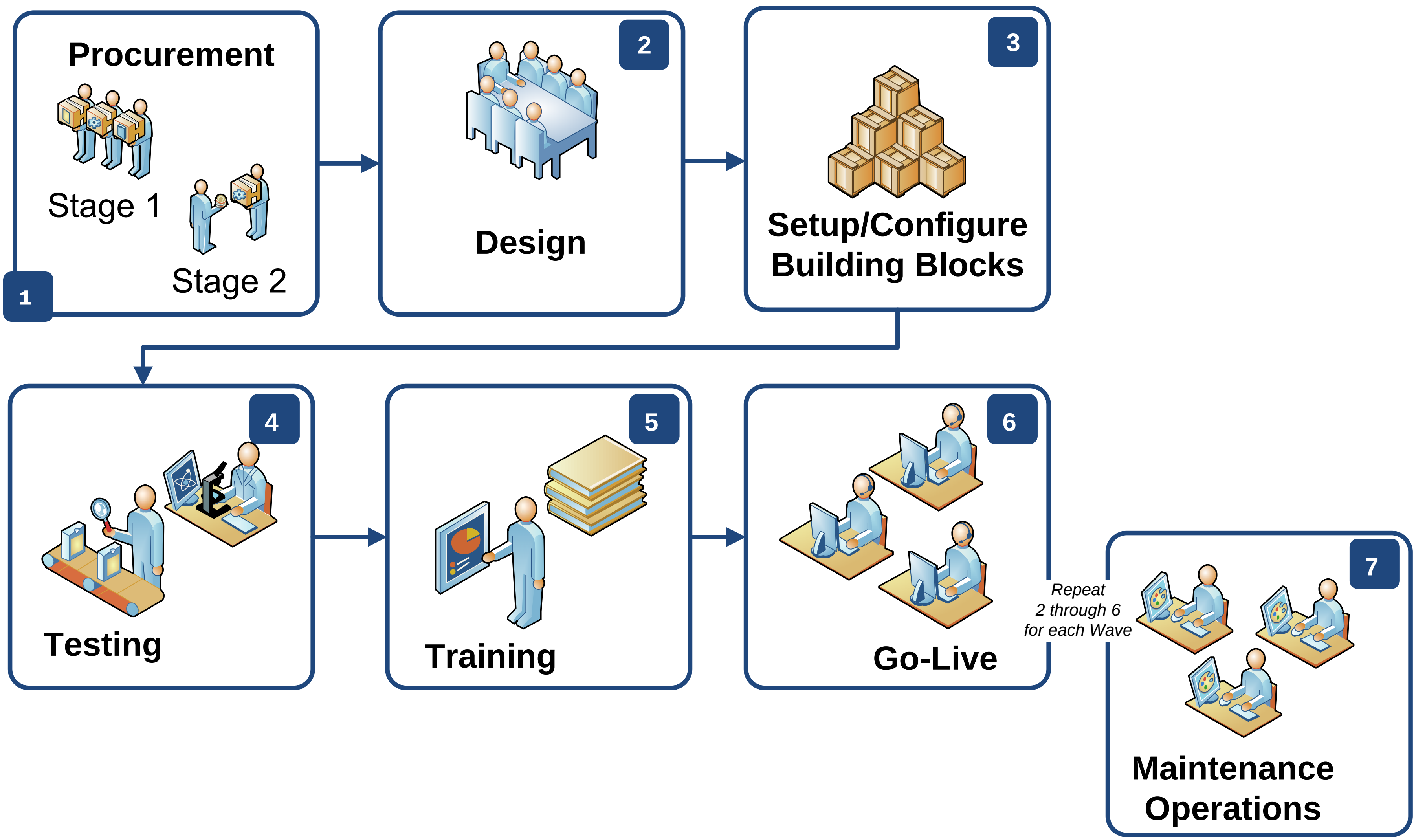
What Lies Ahead



Implementation

- Pre Wave (4/1/2013)
  - *“Go Live”* planning, design, business process reengineering (BPR), legacy system analysis
- Wave 1 (7/1/2014)
  - Limited functionality for limited number of departments

Implementation (continued)

- Wave 2 (7/1/2015)
  - Majority of functionality, 30% of control agencies and departments
- Wave 3 (1/1/2016)
  - Remaining functionality, 30% of departments
- Wave 4: (7/1/2016)
  - Remaining 30% departments

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Current Status

FI$Cal Project - Legacy Systems Update

Kathy Booher
Deputy Director
FI$Cal Business Team

Yedukondalu Chalamcherla (YK)
Manager Legacy Systems
FI$Cal Technology Team

Purpose

The Legacy Systems Inventory is an effort by the FI$Cal Project to gather information regarding systems containing accounting, budgeting and contract/procurement functionality.

Why We Collected Information

Why is it important?

- To provide the system integrator (SI) with an understanding of your department's systems and data flows that will be used to:
  - Develop and design interfaces for continuing systems
  - Develop methods for cleansing and converting data from the replaced legacy systems

Legacy System Definition

A system is defined as an electronic or manual tool owned, maintained or utilized by your organization whose main or sub-purpose is in support of accounting, budgeting and/or contracting/procurement processes.

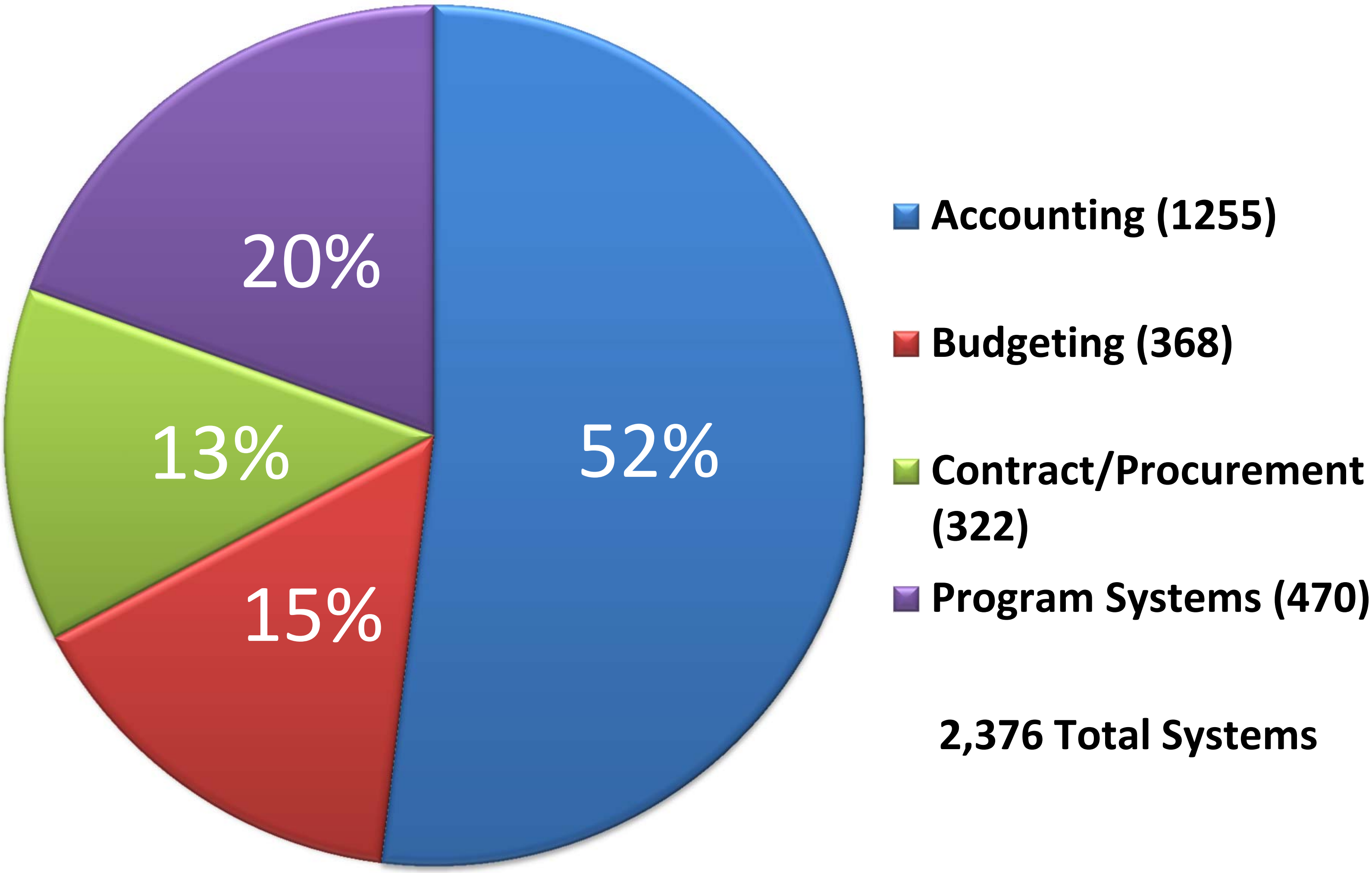
Department Outreach

- This sub-project utilized the Department Liaison Network to identify the Subject Matter Experts (SMEs) to document the systems.
  - Departmental SMEs, identified by Department Liaisons, attended orientation/training sessions
  - FI$Cal staff held weekly conference calls for SME participation
  - SMEs validated that system information received during this effort and previous efforts is accurate

Types of Data Gathered

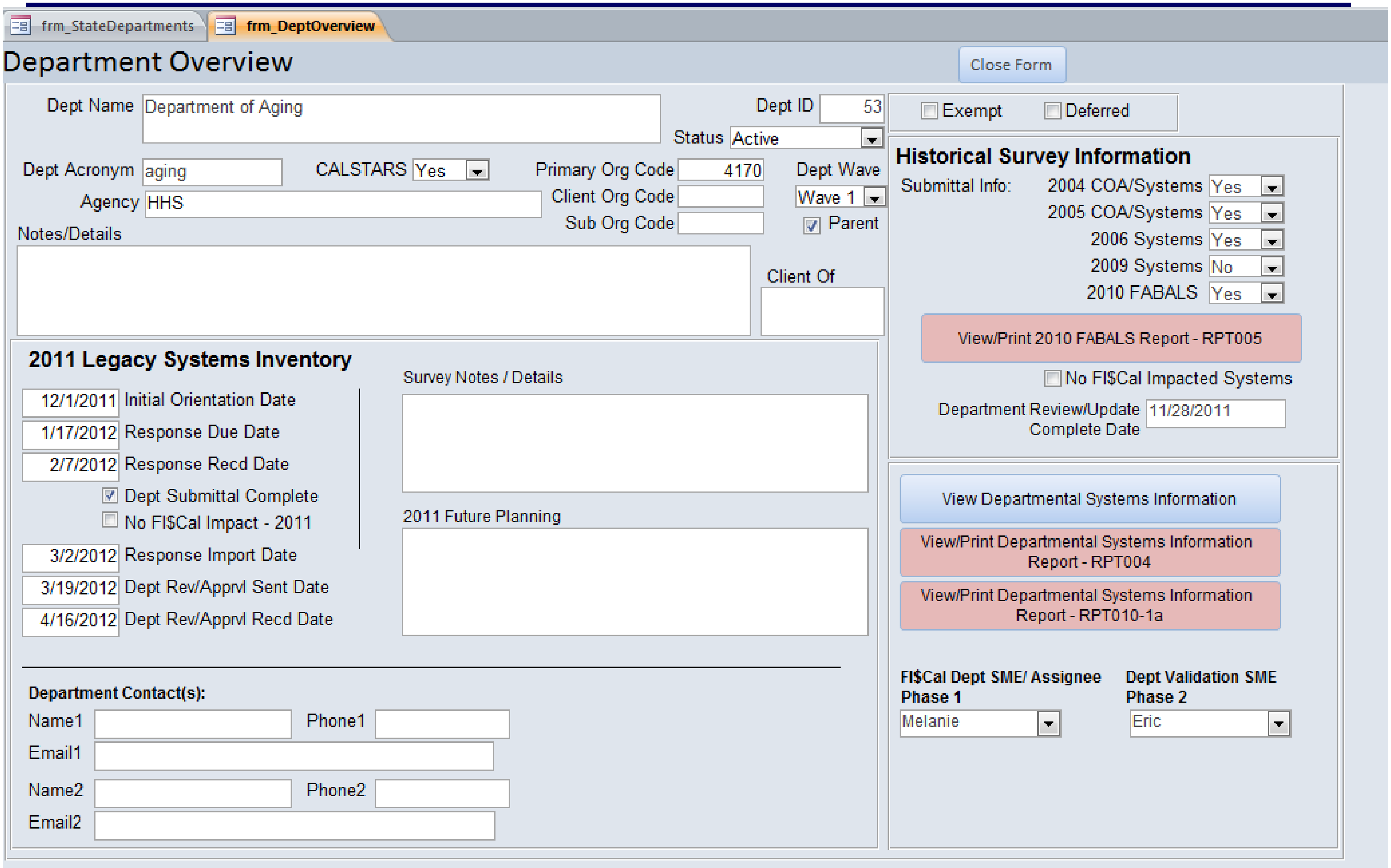
- System Name and Acronym
- System Format
- Business Functionality
  - Primary Functionality
  - Other Functionality(s)
- Inbound/Outbound Data Flows
  - Identify whether the system receives and/or sends accounting, budgeting or contracting/procurement information to/from another system

What You have Provided



2,376 Total Systems

Legacy Systems Repository



frm_StateDepartments | frm_DeptOverview

Department Overview

Close Form

Dept Name: Department of Aging
Dept ID: 53
Status: Active
Exempt
Deferred
Dept Acronym: aging
CALSTARS: Yes
Primary Org Code: 4170
Dept Wave: Wave 1
Agency: HHS
Client Org Code:
Sub Org Code:
Parent
Notes/Details
Client Of

Historical Survey Information

Submittal Info:
2004 COA/Systems: Yes
2005 COA/Systems: Yes
2006 Systems: Yes
2009 Systems: No
2010 FABALS: Yes

View/Print 2010 FABALS Report - RPT005

No FI$Cal Impacted Systems

Department Review/Update Complete Date: 11/28/2011

2011 Legacy Systems Inventory

12/1/2011 Initial Orientation Date
1/17/2012 Response Due Date
2/7/2012 Response Recd Date
Dept Submittal Complete
No FI$Cal Impact - 2011
3/2/2012 Response Import Date
3/19/2012 Dept Rev/Apprvl Sent Date
4/16/2012 Dept Rev/Apprvl Recd Date

Survey Notes / Details

2011 Future Planning

View Departmental Systems Information

View/Print Departmental Systems Information Report - RPT004

View/Print Departmental Systems Information Report - RPT010-1a

Department Contact(s):

Name1
Phone1
Email1
Name2
Phone2
Email2

FI$Cal Dept SME/ Assignee Phase 1: Melanie

Dept Validation SME Phase 2: Eric

Workgroup for Legacy Systems Analysis

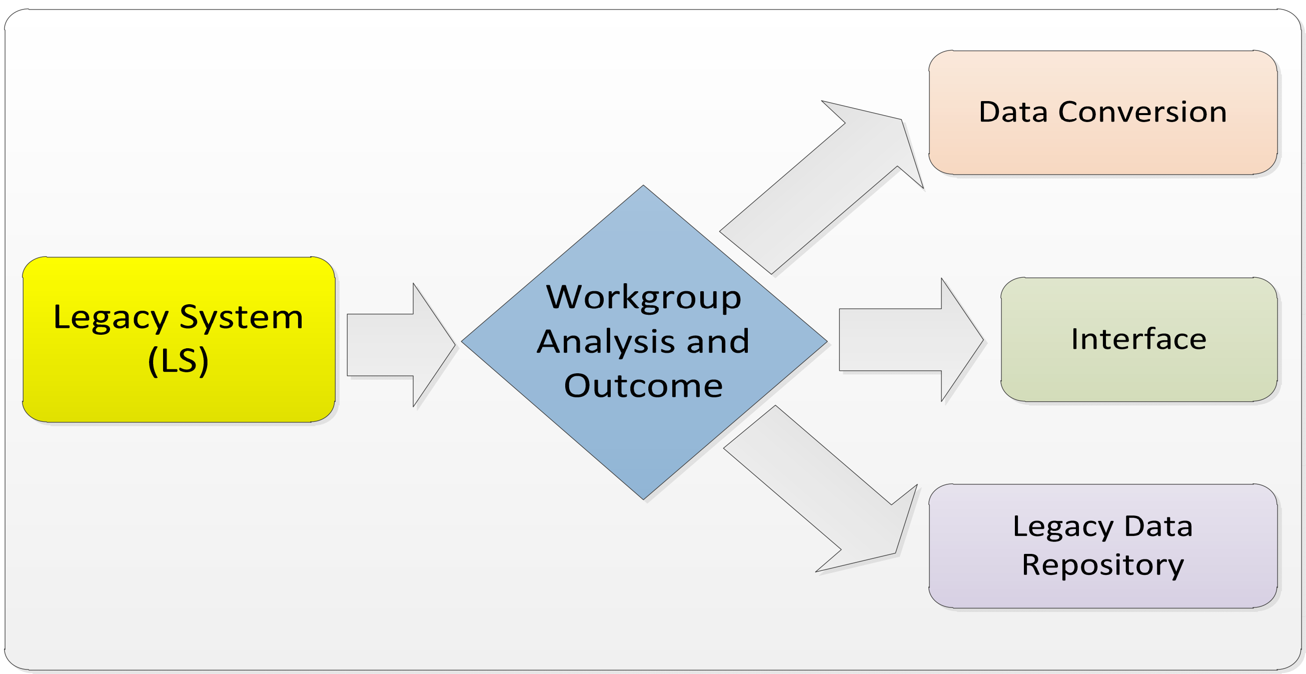
Workgroup Composition:

Departmental Business and Technical Teams

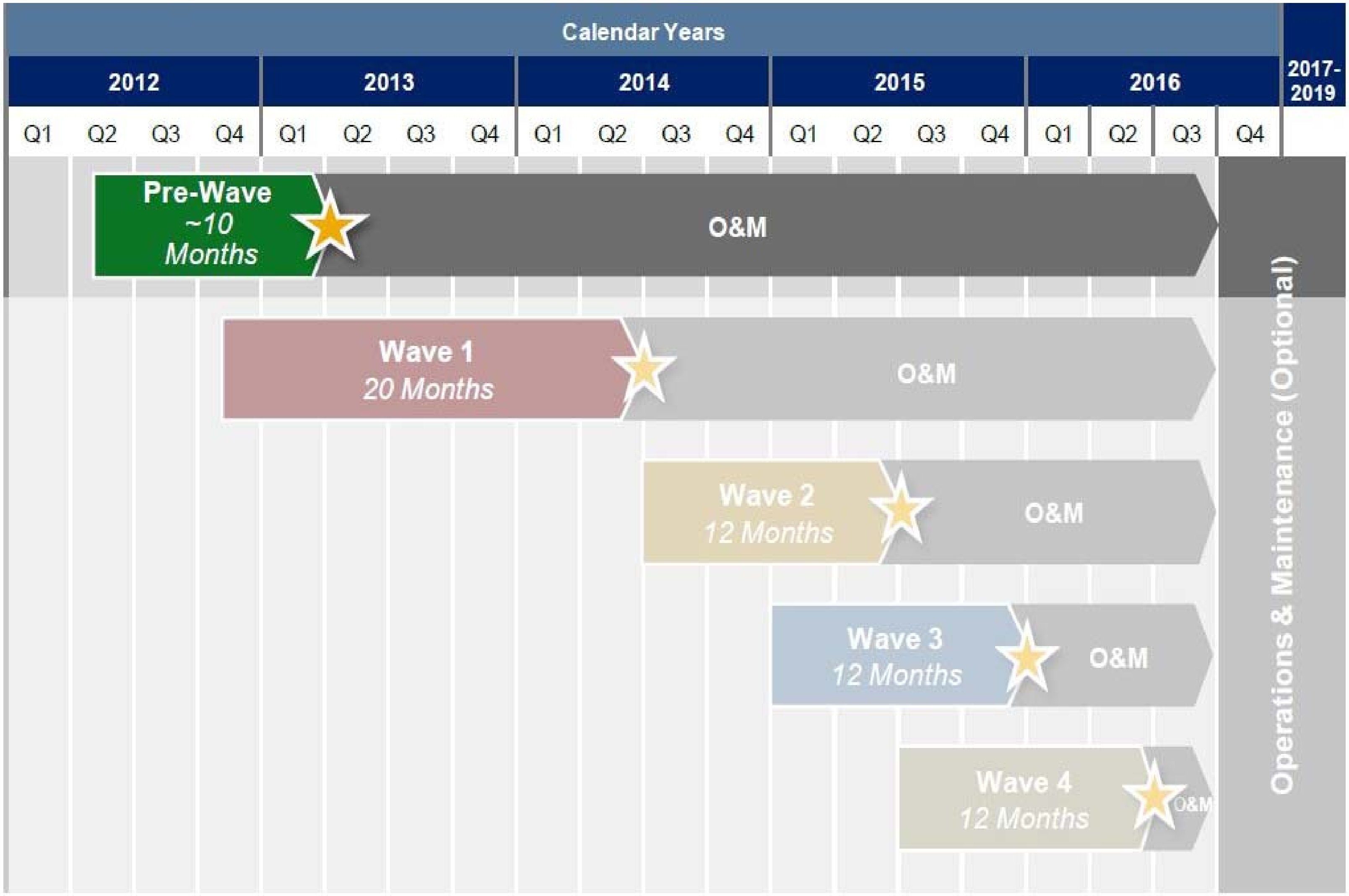
Partner Business and Technical Teams

FI$Cal Business and Technical Teams

Systems Integrator Business and Technical Teams



Project Timeline



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Next Steps

- Security & confidentiality requirements
- Data retention policies
- Interfaces documentation
- Technical documentation

Change Management

Change Readiness Assessments

Will Padilla

FI$Cal Change Management Office

Change Management

- Change Management Office (CMO) Overview
  - Staff introduction
  - Responsible for change management, communications and training
  - FI$Cal and Accenture have change management staff that will work with departments

Change Readiness

- Participation in readiness survey allows FI$Cal to prepare to guide departments through change management activities and meet training needs
- It will give departments information needed to prepare for FI$Cal and prepare for FI$Cal

Change Readiness Assessments

- Purpose and Definition
  - Assessing awareness and readiness is vital to project success
  - Assessments are used to ensure gaps are identified and communications/activities are developed before moving to a subsequent phase of a project

Change Readiness Assessments

- Plan for Change Readiness Assessments
  - The FI$Cal CMO will introduce change readiness assessments at key points in the project, beginning with Wave 1 departments

Change Readiness Assessments

- Assessment Format/Structure
  - Standard rating questions (agreement scale)
  - Demographic categories (e.g. department, role, functional area, etc.)
  - Open-ended comment questions

Change Readiness Assessments

- Initial stages establish a baseline of staff awareness of:
  - Anticipated benefits
  - Knowledge of how business processes will be developed

- Subsequent stages will measure progress and how knowledgeable staff are about:
  - Training they will receive
  - How they will prepare to use the new system

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Change Readiness Assessments

- Stakeholder Involvement
  - Stakeholders will be asked to respond to surveys
  - Individual responses are confidential
  - Results will be tabulated so that targeting activities can be used to fill any gaps in awareness, knowledge, and anticipated benefits

Change Readiness Assessments

- Follow-up Activities
  - Communicate results
  - Communicate activities before moving on to next phase
  - Provide information to system integrator to use in their planning for change management activities

Q&A Session

Thanks for coming!

The Next Generation

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